

## Measuring preparedness of web communication for a positive digital experience of international prospects right at the beginning of the customer journey: Survey results

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**Abstract:** In an exploratory study about online communication of large and medium-sized B2B companies from the German state of Baden-Württemberg, their message content communicated via websites, and their websites' appeal for international prospects, has been analyzed. It revealed many basic content items absent, making the site less attractive for further exploration, and difficult for international prospects to enter into a dialog, become leads, and possible customers. The subsequent survey elicited organizational backgrounds, available resources, and objectives for online communication. It could trace deficiencies back to a lack of understanding of the importance of digital communication for lead generation, and the customer journey in general, absence of a communication strategy, lack of urgency, and lack of resources to implement desired changes and additions to communication content.

**Keywords:** Web Communication, Website, Digital Communication, B2B, Digital Experience, Lead Generation, Customer Journey, International Prospects, Quantitative Content Analysis, Machine-Building Industry, Baden-Württemberg, Large and Medium-Sized Companies, Message Content

### 1 Introduction

Compared to consumer business, business-to-business (B2B) contracts regularly involve larger sales volumes, repetitive sales for longer periods of time, higher legal risks, and greater complexities with associated risks of misunderstandings. Thus, for communication with international business customers, companies rely heavily on personal interaction to alleviate risks of dealing with problematic or even unwanted partners. This approach is costly, slow, and success is heavily dependent on the individuals involved.

In contrast to this, digital communication channels are not only gaining in importance for consumers in form of social media channels, but also for B2B communication, esp. in the lead generation phase. The promise of digital channels are lower cost, instant access and possible feedback, and potentially higher efficacy, and efficiency [PZ02] [HS04].

A cornerstone of B2B communication for lead generation has been the (physical) business fair where companies met prospects, made and nurtured leads, and tightened relationships with customers and partners. Though business fairs increasingly expand

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into the virtual world with add-ons and prolongations to the physical booth [Ga14], the traditional web site remains the digital cornerstone of B2B communication, shaping prospects' first impression, and their willingness to explore business opportunities, as well as enter into a personal dialog.

Therefore, it is of great importance to design a web site that is attractive for international prospects, and invites exploration and information seeking from all over the world [PK17]. Management has to come up with and decide, what it is a company has to provide information about in order to be attractive for international prospects. This necessitates an understanding, which communication elements contribute to website attractiveness, how attractiveness may be measured in order to find deficiencies and highlights, as well as compare one's own web communication to a competitor's. Finally, management, as well as staff, need guidelines for target- and goal-oriented web communication [Hi17].

Unfortunately, rapid changes of web technologies, and digitization of business processes make improvements of web communication a moving target, lacking the standardization of non-digital communication, and lagging behind possibilities digital communication allows for. Our research contributes to improved web communication via comparative measurement allowing for goal-oriented adaptation of message form and content.

## **2 Current state of web communication measurement**

In general, web communication measurement is predominantly results-based, based on trial and error, i.e. a web shop may change its design, the type of information provided, a product description, the view angle of a specific product, or only the context of presentation. Then, these changes are tested on a fraction of website visitors, e.g. on every 15<sup>th</sup> surfer. When enough data has been gathered, and performance is sufficiently increased, for instance in form of higher click-through rates, or longer retention periods on the site, those changes are implemented for the rest of the product category, or the whole site, and rolled out in a relaunch of the website, often with accompanying marketing communication.<sup>2</sup>

An increasing number of market research companies is joining web design and communication agencies with offers for such market-tested website optimizations and relaunches. However, this approach is prone to primarily allow for incremental improvements on the basis of customer judgment, without measurements of success factors based on available theory and a broader, possibility-driven perspective, and without due comparability across website visitors.

One approach to improve on relevance of success factors is the sectional comparison of

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<sup>2</sup> Westwing Home & Living, an "Interior Shopping Club", with the German URL [www.westwing.de](http://www.westwing.de), reported the launch of 6 international sites at the time of market launch but subsequently cancelled 3 "nonperforming" sites already after the first 6 months of operation.

searches and product interests of the OVK bi-annual measurements<sup>3</sup> [OVK16]. In these, internet users are asked and/or tracked about their 16 top product interests on the internet, as well as their 16 top search and information topics. This is already a coarse determination of user interest in specific information subjects based on the AGOF study's industry segmentation, and respective product representation.

In addition, the OVK's approach is also elaborating on creative elements of web ads for success of lead generation on the basis of user interests<sup>4</sup>. In their latest study on mobile ads they had a catalog of 28 features and variations of mobile creations judged by 12.742 responses in 227 mobile ad formats. The study revealed the great importance of creation for website communication success, distinct from message content. The authors can break down creation's contribution to success into 7 factors<sup>5</sup>. However, they also demonstrate the difficulty to come up with prescriptive, or constructive, arrangements of the elements of creation to design a specific wanted effect. Nevertheless, they can show general effect and success tendencies of the presence, or absence, of specific elements of creation.

Disregarding fun sites, when a website's main objective is serious communication, i.e. conveying message content is the primary objective as in B2B relations, one of the most basic properties of company communication the web site should convey to visitors is credibility. A study by Fogg et al. in 2003 that set out to answer the question "What makes a website credible?" analyzed over 2600 comments on credibility judgments and classified them into indications for credibility. One comment could be classified into different categories at the same time. Considering the 5 most important indicators, it turned out that in 46.1% of the incidences, the "look of the design" was an important indicator of credibility of website content, followed by "information design/structure" with 28.5%, "information focus" with 25.1%, "company motive" with 15.5%, and "usefulness of information" with 14.8% of incidences, respectively<sup>6</sup> [Fo03].

The findings of Fogg, Eisend [Ei03] and others are plausible:

When a company and its products are not known, appearance and look of the design are site visitors' dominant indication of credibility of the information provided. In order to optimize, here, designers need to take heed of most current web design and usability guidelines. These are not industry-specific, but certain design elements may be more acceptable for, or better convey message content to a particular target audience.

<sup>3</sup> OVK Online-Report 201x/01 and OVK Online-Report 201x/02, especially since the methodological changes in 2011. Reports are published by the OVK (Online-Vermarkter-Kreis) within the BVDW under the URL [www.ovk.de/ovk-de/online-werbung/daten-fakten/downloads.html](http://www.ovk.de/ovk-de/online-werbung/daten-fakten/downloads.html), e.g. OVK Online-Report 2016/02 pp. 24-25

<sup>4</sup> The OVK study „Power of Creation“ in 2013 has been the largest German study of perception and efficacy of creations in the online world, focusing on online display ads on the desktop. The study in 2015 focused on creations of mobile ads, both leading to "Guidelines für die Erstellung wirkmächtiger Online-Display-Ads".

<sup>5</sup> Inducement of recall, appreciation of product, benefit transportation, helping attractiveness, enhanced understanding, increased valuation, creative surprise in "Power of Mobile Creation", cited in OVK Online-Report 2016/02, p. 30

<sup>6</sup> A more elaborate discussion of credibility of marketing messages including digital channels may be found in the dissertation of Martin Eisend: Glaubwürdigkeit in der Marketingkommunikation, DUV, Wiesbaden 2003

Unlike design, site content is company-specific, and management needs to define company specific information content and structure according to their knowledge of what may be useful content for potential international prospects. This knowledge may come from their sales reps and other parts of the company dealing with customers and prospects, from market research companies, as well as from scientific studies. All too often, however, in B2B environments, it is left to the web agency to decide upon web content. This resulted from a study that had originally been developed to understand the perceived bad web communication of internationally quite successful German machine builders from the state of Baden-Württemberg<sup>7</sup> [HŠ13]. They are often those hidden champions in their niche, market leaders in their product field, very successful all over the world but also often exhibit websites with communication far apart from their product championship: Products could not be found, subsidiaries and distribution partners were hard to find and identify, web communication of different parts of the company was not integrated, even inconsistent, and so forth<sup>8</sup>.

In search of website excellence, the author, together with a business partner<sup>9</sup>, set out to measure internationalization of web communication for B2B companies in select industries in Baden-Württemberg. We focused on low information and contact barriers for international site visitors, and the presence of some basic content elements amenable to lead generation. This seemed a reasonable limitation when considering type and scope of information provided by those industries on the web, as well as the objective pursued by companies with their website.

When type and scope of content needs to be measured, many researchers in the social sciences today use quantitative content analysis (QCA), a research methodology greatly advanced with the help of computers, and digitized data, during the last 3 decades ([RSC15a] [RSC15b] [Ne02]). It improves qualitative content analysis with respect to accuracy and comparability [Sc12] [RA04]. We chose quantitative content analysis for our study as creative design elements do not seem to be an important element of image creation in B2B industries, and the methodology allows for comparative quantification of message content.

### 3 Research approach

The state of Baden-Württemberg, for decades now, belongs to those regions in the EU with the highest export quotas, and greatest innovative capacity. For companies in this region, internationalization is nothing new, but a long-term successful strategy to overcome limitations of national market potential. B2B and investment type industries are

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<sup>7</sup> Part 2, Online-Survey of the publication "Internationalisierung von B2B-Websites baden-württembergischer Unternehmen", available from the authors, Roland Heger and Deciderio Šonje, June 2013

<sup>8</sup> A grave example had been ILLIG Maschinenbau GmbH & Co. KG, a market leader in machines for thermo-forming; today's website shows much better communication, however, there is still room for improvement

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leading this approach to growth. Surprisingly, those companies' web communication did not fit their export success. Thus, we selected 120 companies from distinct industries for analysis of their web communication as shown in the following Fig. 1 on this page.

Company Size \ WZ 2008 [NACE]	2711 [31.10] Electric motors, generators, transformers	2813 [29.12] Pumps, compressors	2815 [29.14] Bearings, gears, cog wheels, drive elements	2841 [29.4(0)] Machine tools for metals
50 - 249 FTEs	31 (30)	25	56 (55)	60
250+ FTEs	14 (13)	14	21 (19)	30 (28)
Sum total of companies in BW	101	86	157	193

Numbers in (parentheses) are companies left over after elimination of the same web addresses  
Numbers in [square brackets] are WZ 2008 equivalent NACE Rev. 2 codes of the European Union

Fig. 1: Population universe of companies sampled, according to industry and size class

The sample consists of 4 times 30 companies with their main statistics classification according to the German federal statistics code WZ2008 [NACE Rev.2 equivalent] in the following four B2B industries: 2711 [31.10] electric motors, generators, and transformers; 2813 [29.12] pumps, compressors; 2815 [29.14] bearings, gears, cog wheels, and tractions parts; 2841 [29.4(0)] machine tools for metals.

In each industry, subsamples were drawn from medium-sized (50-249 FTEs<sup>10</sup>) and large ( $\geq 250$  FTEs) companies according to the German statistics office, as far as possible from the number of companies available in respective groups. In each subsample companies were ordered according to FTEs, and the largest companies in decreasing order were chosen in each subsample. This approach ensures that the largest possible market coverage in terms of employees is chosen for each subsample. At the same time it ensures the greatest possible statistical distance between these two groups for easier detection of group differences.

Analysis consisted of two parts: Once, every company's website was analyzed with the German as well as 3 non-German languages, as far as available on the company's site, resulting in 420 language- or country-specific sites of 120 companies. Measurement was conducted with quantitative content analysis on the basis of 28 content items. These items represent 6 content areas deemed relevant for lead generation: language-/country-specific addressing of message content, contact possibilities, company self portrayal and references, press area, and business fairs. In 2 subsamples 100% of available companies were analyzed, in the other 6 subsamples market coverage in terms of turnover is over 50%, respectively, making the industry samples representative, and allowing for generalizations about the respective company universe.

<sup>10</sup> FTE: Full-time equivalent employees

Second, all 120 companies were invited to take part in a survey designed to elicit reasons for choice of content elements. Specifically, the survey was designed to reveal responsibilities for content elements, objectives for online communication, the share of international business, organizational backgrounds, available resources, and adaptations of message content to international target audiences. A slight majority (61 companies) of companies analyzed in the first part completed the survey, resulting in an extraordinary 50.8% response rate. As only 3 companies answered anonymously, the survey can be termed as representative of the industry subsamples in the state of Baden-Württemberg, too.

## **4 Results of the survey**

Being technically minded, in most cases with high product complexity, and exhibiting a high share of international sales, analysis of websites revealed: Internationalization of web communication is staying behind possibilities, making access for prospects difficult for reasons of missing languages, incomplete contact information, missing information about presence at business fairs, and so on. Nevertheless, in general, in the survey, the necessity to cater to needs of international prospects seems to be recognized and accepted by respondents.

Picking out language, companies go through some efforts to address prospects in their respective language. In over 90% of company websites, visitors apart from German, are addressed in at least one other language, mostly in English. One quarter of companies offers information on their site in three to five languages, and one sixth of websites is available in more than six languages.

Relevance of international communication may be obvious with shares of turnover resulting from exportation: A little less than half of responding companies (47%) show export quotas of over 50%, and another 33% show export quotas between 25% and 50%. This means that 80% of companies in the state of Baden-Württemberg out of these industries show significant to extremely high export shares. One of the reasons for this is the high grade of specialization of respective companies, usually commanding a product leadership in their niches. It is obvious that these companies do have the necessity to deal with customers, and prospects, all over the world, and the necessity for a digital communication that caters to this need.

Relevance of international business for the selected industries may also be illustrated with Fig. 2 on the following page. A high share of 15% of companies was not able to provide figures of the number of countries they ship their products to. Of those who could, 44% distribute in less than 20 countries, 21% in 20 to 39 countries, 29% in 40 to 59 countries, and only a small fraction of 6% of those companies distribute in 60 and more countries.

In 41% of cases those foreign countries are handled with own subsidiaries, the majority of 54% of foreign countries are dealt with via external distribution partners. Especially medium-sized companies usually do not afford the resources to enter a country with own people. Often, they are too small to be able to devote resources to countries with lower turnover, and it may not make sense from a business point of view due to fixed cost.

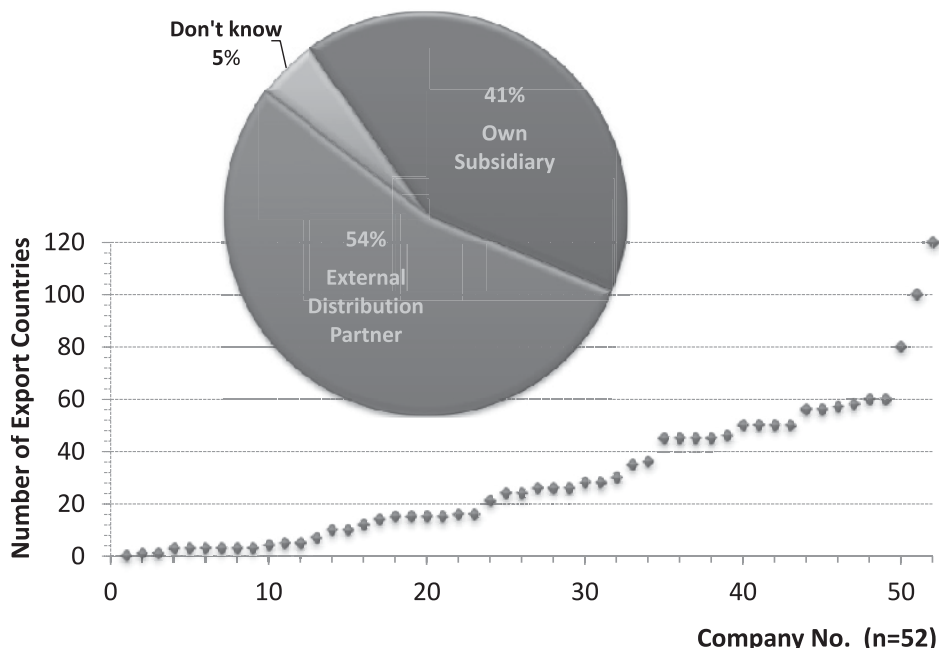


Fig. 2: Countries and form of international distribution

Though they may have found the right approach to international distribution, companies from the B2B industries chosen seem to have great difficulties finding the optimal organization for web communication: Headquarters are basically always driver, or involved in arrangement of web content. But overall, resource allocation in terms of headcount seems too limited.

Fig. 3 on the following page highlights distribution of responsibility for web communication. In about one third of companies (31%) one person is solely responsible for all web communication. Considering the dazzling array of online tools, and the importance of web communication as an information channel for prospects as well as for current customers, this allocation of resources appears at least a daring endeavor.

In more than two thirds of companies (69%), responsibility for web communication is shared. In a little less than half of these, i.e. another third (30%) of all companies, 4 or more colleagues share responsibility for web communication, and thus seem organizationally prepared for a balanced international website.

Out of the 69% of colleagues who share responsibility for the web, 95% of these involve colleagues from headquarters while only 19% are from some subsidiary. From an organizational point of view, relevance of the digital communication channel for the whole company seems already structurally established, but only partially the necessity to address local peculiarities, and the possibilities to increase attractiveness with local adaptations.

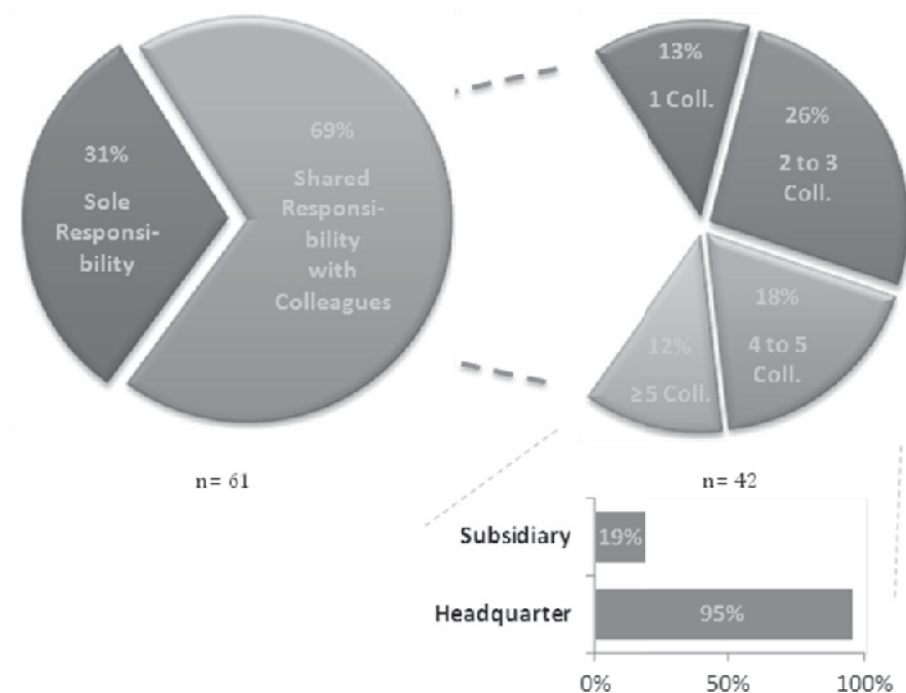


Fig. 3: Distribution of responsibility for web communication

Fig. 4 on the next page shows that only a small fraction (13%) of online marketers is able to solely focus onto these tasks while the great majority (87%) also needs to handle other marketing assignments. Sorting out these "other" assignments, 79% of online marketers also have to prepare and handle print, 72% involve organization and dealing with business fairs, and 53% of those who are also tackling non-online tasks have to handle additional marketing topics, e.g. public relations, social media, or simply all other marketing tasks.

When asked what fraction of working hours online marketers are able to spend for work in conjunction with their web offers, numbers in Fig. 5 are disillusioning: Over half of them (57%) is able to spend less than a quarter of their time for online communication, a total of 77% less than 50% of their time, and only 13% is able to spend more than three quarters of their time for online tasks. This also documents the too little effort due to

scarce resources that go into optimization of online communication.

Missing possibilities to specialize and focus for lack of manpower and time may be the primary reasons for suboptimal internationalization of web communication.

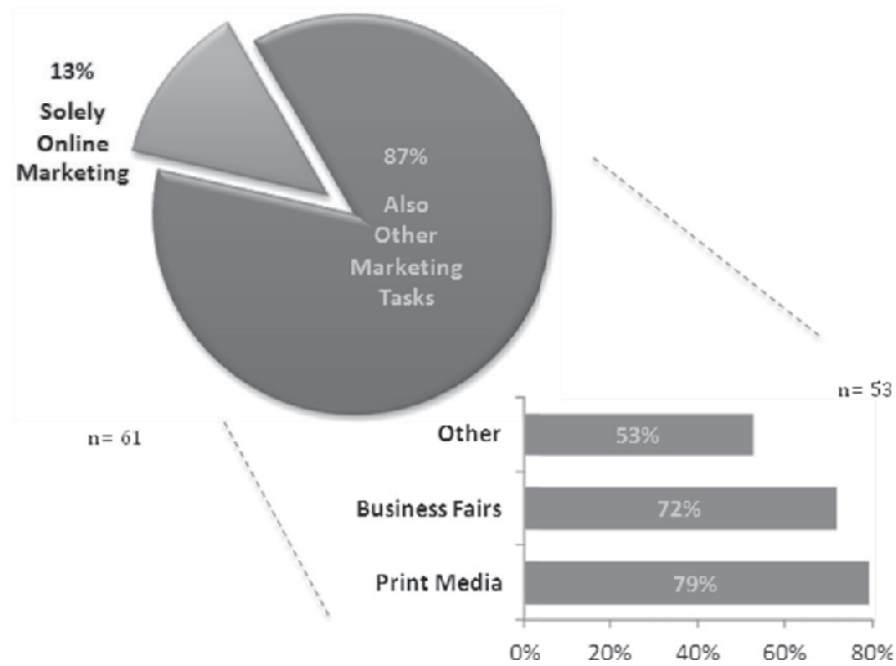


Fig. 4: Online-marketing focus

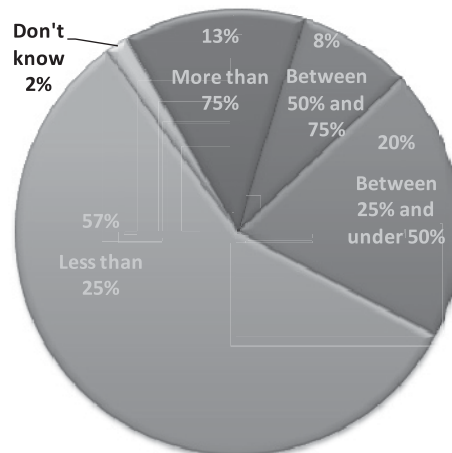


Fig. 5: Time for online-marketing

Referring to adaptations in terms of content, and/or design, for different languages or countries, only a minority of 18% of companies abstained from respective adaptations. When asked why, according to Fig. 6, 36% of respondents argued a lack of time, 27% blamed insufficient budgets, and 9% argued that internationalization of communication is difficult and introduces undue complexities. 55% of respondents cite sometimes very special reasons why they skipped adaptations, reaching from “too difficult” to “unnecessary”. Excuses seem to be mixed with true barriers insurmountable by the individual.

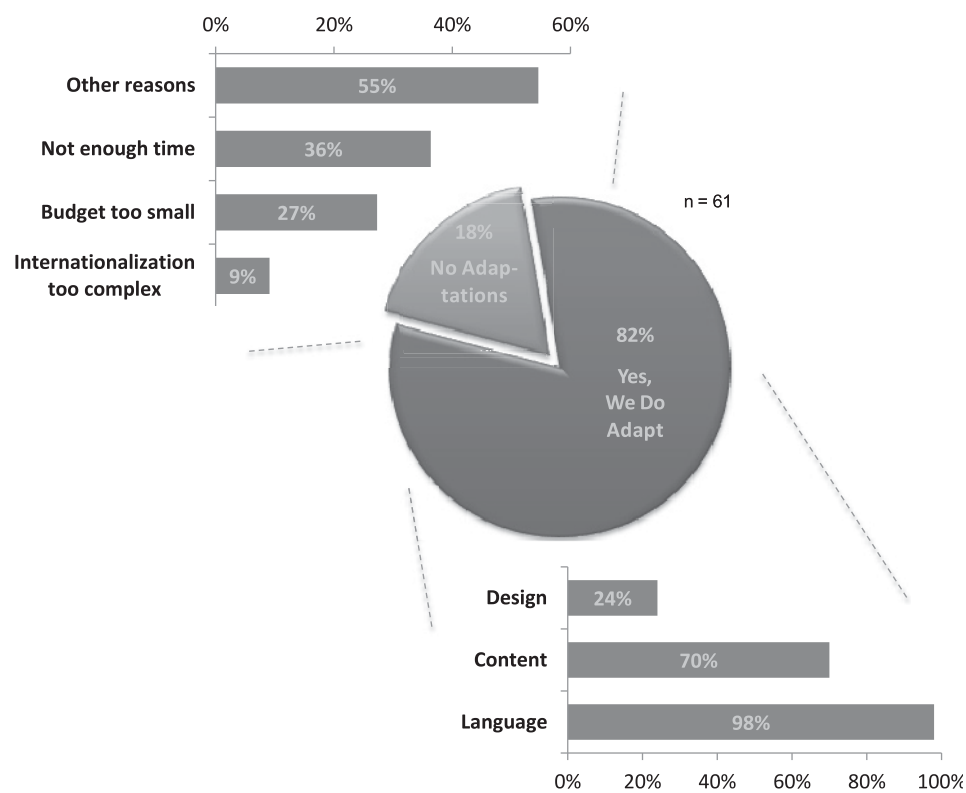


Fig. 6: Reasons for abandonment and conduct of international adaptations

The great majority of respondents (82%), however, implemented one or the other adaptation for an international audience, even with the expected priority: Nearly all companies (98%) communicate over the web in at least one other language than German, adapting to target languages and countries. 70% do adapt their content to different audiences, sometimes with special landing pages, usually in specific sections of the website. And just under a quarter (24%) also adapts website structure and design towards their international target segments. In addition, visual displays, pictures, and product references are common areas of regional or local adaptations.



When asked about wishes for future changes, 48% of respondents were content with current variations of web communication and do not see any urgency to change. With four fifth of companies already adapting content it may be surprising that a slight majority of 52% still has larger wish lists, interesting enough with the same priority as those who already implemented regional/local adaptations: 72% of them want more or other languages, 56% seek to expand and restructure content, and 28% want to strive for greater local appeal with adaptations in information structure and design.

In terms of process improvements, there are long wish lists, too, with priorities for “simpler contact and lead generation” (83%), “improved information possibilities for local prospects and customers” (83%), “website support of services” (43%), “more and better support for buying and sales” (38%), and “better support with closing and order processing” (23%).

## 5 Discussion

The great majority of respondents seem to recognize possibilities of web communication in general, for their B2B business, as well as for international prospects and customers. At the same time, they recognize the deficiencies, and limitations, they currently have to live with. Management in these industries does not seem to feel the same urgency as their staff. Allocation of resources is broadly seen as too scarce, and from a researcher’s perspective, with experience of digital approaches in other industries, are obviously miniscule. The wish for (additional) local adaptations (74%), or even a local site (30%) is an indication of further improvement potential.

Online marketing of sampled industries is hampered by low staffing, and from being distracted by traditional marketing tasks (print, business fairs, etc.). A majority of staff (57%) can only devote a small fraction of their time (less than 25% of work hours) to online activities. The wish to optimize lead generation, communication, and processes, with digital marketing is limited by insufficient resources.

Online activities appear well integrated into the general marketing organization, with headquarters already financing a third of local adaptations. In addition, with headquarters being involved in basically all project in this area, the prerequisite for a central push of online activities is already available.

Development and extension of online activities of select B2B industries is primarily hampered by 2 barriers:

Perception of management about the importance of online communication for information gathering and lead generation is lagging behind current developments in other industries. Second, and in the wake of the aforementioned, increase and redistribution of resources from traditional marketing to digital ones is much slower than for instance in the consumer industry.

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